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A-NZ Peppol Stakeholder Working Group - Access Point Migration & Exit Focus Group

Meeting Summary - 9 June 2022

Item #	Outcomes
1	**Introduction** Maggie Leese welcomed everyone to the group and acknowledged Traditional Owners in Australia and NZ.

2	**Re-cap statements from previous meeting**
	Andrew Stein re-capped the draft statements from the previous meeting. The statements were updated and participants agreed with the statements as follows:
	1. All end users should have the ability to request to de-register. This request should be made to whoever they have the relationship with, i.e. either their Business Management Software (BMS) or Service Provider (SP). This acknowledges that SMEs are often unaware of who their SP is.
	    a. There should be an established process to request to de-register.
	2. The existing Service Provider (SP) should verify that it is a valid request and that it has been authorised before the technical switch occurs.
	    a. There should be a statement of consequences that may result from switching off eInvoicing, highlighting the features they'll lose (e.g. sending and receiving eInvoicing) from their current SP. The SP should then reconfirm that the end user will proceed with the switch, and if they don't understand, an opportunity for them to contact their SP for more information.
	
	Note: SP is taken to mean both Access Points (APs) and/or Service Metadata Publishers (SMPs).
	
	There was a discussion on the SuperStream approach for switching gateway providers which requires two weeks' notification of the switch and sets an "effective date" to allow for a seamless process. It was noted that the SMP does support effective dates and multiple entries but the SML does not, meaning this approach may not suit Peppol processes.
	
	Question around if there is an outage or an SP exits uncooperatively, whether the PAs could assist in performing a switch. This would be something that would be escalated to OpenPeppol as PAs should not be able to touch SML entries. This becoming an OpenPeppol process could be a recommendation from the focus group.
	
	Moving forward, the focus group will refer to accounting software etc. as business management software (BMS).

3	**AP switching scenarios / processes** As the discussion focused around BMS, the group started with scenario 1.2 from the pack: SME initiated switch - switching BMS.

While some may have a process in place, it was accepted that few BMS have a clear process in place for end users to deregister.

It was agreed to add an extra step in this process between "ensures request is legit" and "removes SML record by due date" which can give the end user:

- More information about how the switch will happen
- Features that may be lost
- A point of contact for any questions
- The choice to continue with deregistering or cancelling the process
- More information about the date and time or timeframe for the switch (if they choose to proceed)

This information is important to help the end user better understand the potential consequences of the switch. It was agreed that the BMS features are out of scope as this is up to the BMS themselves. However, the group may choose to provide some sample wording about losing Peppol sending and receiving features.

A question was raised about how this process could fit within existing processes for switching BMS. It was noted that within a BMS switch, using your new software does not impact your ability to use your old software (providing there's an overlap). However with eInvoicing, the switch is required to enable Peppol functionality within the new BMS.

There was a conversation about a scenario where the end user leaves their BMS (e.g. BMS licence lapses/finishes) and does not proceed to switch to a new BMS. There is an expectation that when an end user has ended their BMS subscription that the BMS will immediately remove the end user's listing in the SML. The ATO will investigate the new agreements to check whether this is specifically addressed.

It was questioned how an SP would know if an end user has stopped using a particular BMS, without this being specifically communicated. The BMS themselves may not realise they should initiate removing the end user's listing in the SML. The end user may also find it difficult to contact the BMS to get themselves deregistered if they have lost access to the BMS's support.

4	**Next steps and wrap up** Agreed to have another meeting of the smaller group to continue working through scenarios in the slide pack. The focus group will meet again on 23 June at 10.30am AEST / 12.30am NZST.
5	**Meeting close**